

## Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

## Program: PSA 2 - HICAP Services of Northern California

From: 07/01/2010 To: 06/30/2011

## Public and Media Data Report

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>Type of Activity</b>					
<b>Interactive Presentations to Public in Person</b>					
Total Number of Events	6	18	11	3	<b>38</b>
Estimated Number of Attendees	154	591	315	7	<b>1,067</b>
Estimated Number of Persons Provided Enrollment Assistance	0	0	1	0	<b>1</b>
<b>Booths or Exhibits at Fairs or Special Events</b>					
Total Number of Events	6	3	2	3	<b>14</b>
Estimated Number of Attendees	240	110	158	250	<b>758</b>
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	<b>0</b>
<b>Mobile InfoVan Events</b>					
Total Number of Events	0	0	0	0	<b>0</b>
Estimated Number of Attendees	0	0	0	0	<b>0</b>
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	<b>0</b>
<b>Dedicated Enrollment Events</b>					
Total Number of Events	0	1	0	0	<b>1</b>
Estimated Number of Attendees	0	8	0	0	<b>8</b>
Estimated Number of Persons Received Any Enrollment Assistance	0	7	0	0	<b>7</b>
Enrollment Assistance with Medicare Programs(s)	0	7	0	0	<b>7</b>
Enrollment Assistance with Part D	0	0	0	0	<b>0</b>
Enrollment Assistance with LIS	0	0	0	0	<b>0</b>
Enrollment Assistance MSP	0	0	0	0	<b>0</b>
Enrollment Assistance with Other Medicare Program	0	0	0	0	<b>0</b>
<b>Radio Shows Live or Taped (Not a Public Service Announcement)</b>					
Total Number of Events	1	0	0	1	<b>2</b>
Estimated Number of Attendees	10,000	0	0	20,000	<b>30,000</b>
<b>TV/Cable Shows Live or Taped (Not a Public Service Announcement)</b>					
Total Number of Events	0	0	0	1	<b>1</b>
Estimated Number of Attendees	0	0	0	29,900	<b>29,900</b>
<b>Other Electronic Events (Public Service Announcements (Radio/TV), Ads, Crawls, etc.)</b>					
Total Number of Activities	0	0	0	0	<b>0</b>
Estimated Number of Persons Reached	0	0	0	0	<b>0</b>

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	Q1	Q2	Q3	Q4	
<b>Other Print Activity (newspaper articles, fliers, phamplets, etc.)</b>					
Total Number of Print Activities	6	6	5	5	22
Estimated Number of Targeted Persons Reached	114	35,625	81	29	35,849
<b>Presenters</b>					
<b>HICAP Paid Staff</b>					
Total Presenters	0	0	18	12	30
Total Hours for Length of Activities	0.00	0.00	33.15	34.30	67.45
<b>HICAP In-Kind Paid Staff</b>					
Total Presenters	0	0	1	0	1
Total Hours for Length of Activities	0.00	0.00	1.00	0.00	1.00
<b>HICAP Volunteer Staff</b>					
Total Presenters	0	0	1	1	2
Total Hours for Length of Activities	0.00	0.00	0.15	0.00	0.15
<b>Other Presenters</b>					
Total Presenters	0	0	0	4	4
Total Hours for Length of Activities	0.00	0.00	0.00	3.00	3.00
<b>Area of Focus</b>					
Dual Eligible with Mental Illness	1	5	8	3	10
Employer Termination - COBRA	0	0	2	8	0
General HICAP Information	0	0	0	0	0
Grievances / Appeals - Plan Issues	17	28	17	13	75
Long-Term Care / Insurance	0	0	0	1	1
Low Income Subsidy (LIS) / Application Assistance	5	3	1	3	12
Medicare (Parts A & B)	10	21	11	6	48
Medicare Advantage (Part C)	10	21	12	9	52
Medicare Fraud / Abuse	10	23	10	8	51
Medicare Prescription Drug Coverage (Part D)	5	6	13	13	37
Medigap / Medicare Supplements	11	25	13	10	59
Non-Medicare Fraud/Abuse	8	16	11	8	43
Other Topics / Issues (Health Specific)	0	0	0	0	0
	3	4	3	0	10

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	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
Partnership Recruitment	0	0	1	4	5
Preventive Care Benefits	7	19	11	8	45
QMB/SLMB/QI	8	15	12	8	43
Volunteer Recruitment	0	0	7	7	14
<b>Targeted Audience</b>					
African American	5	8	2	6	21
American Indian or Naitave Alaskan	4	13	0	5	22
Asian Indian	0	0	0	1	1
Caucasian	12	26	13	10	61
Chinese	0	0	1	1	2
Disabled	7	17	2	6	32
Dual Eligible Groups	0	0	1	2	3
Employer Related Groups	10	18	0	1	29
Family Member/Caregiver of Beneficiary	7	17	6	5	35
Filipino	0	0	0	2	2
Guamanian or Chamorro	0	0	0	0	0
Hispanic / Latino	8	12	1	3	24
Hmong	0	0	0	0	0
Japanese	0	0	0	0	0
Korean	0	0	0	0	0
Low Income	13	25	14	6	58
Medicare Beneficiaries	15	21	16	5	57
Medicare Pre-Enrollees	0	0	10	5	15
Mental Health	1	7	0	9	17
Mental Health Professionals	0	0	0	5	5
Native Hawaiian	0	0	0	1	1
Other	1	0	1	0	2
Other Asian	2	7	2	0	11
Other Pacific Islander	1	1	0	0	2
Partnership Outreach	0	0	6	2	8
Presentations to Groups in Language Other than English	1	3	0	0	4
Rural	6	14	9	9	38
Samoan	0	0	0	0	0
Socail Work Professionals	0	0	2	4	6
Some Other Race or Ethnicity	0	0	0	0	0
Vietnamese	0	0	0	0	0

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#### Public and Media Data Report

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	
	Q1	Q2	Q3	Q4	TOTAL
<b>Web Site Hits</b>					
Total Web Hits to Local HICAP Web Site	59	296	311	297	963
<b>Literature from Events</b>					
General HICAP Brochure	399	708	487	246	1,840
"Taking Care of Tomorrow"	10	5	9	1	25
Other Publications (Created by or on Behalf of Local HICAP)	515	1,247	586	495	2,843
<b>Other Literature</b>					
Other Literature	0	0	0	0	0
Brochures from Quick Call	4	4	2	1	11

## Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

## Program: PSA 2 - HICAP Services of Northern California

From: 07/01/2010 To: 06/30/2011

## Client Contacts &amp; Demographics

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>SECTION 1 - Client Contacts</b>					
Total Clients Counseled (unduplicated)	365	1,324	407	389	2,485
Total Finalized Intakes	289	1,138	305	317	2,049
<b>How did client learn about SHIP/HICAP?</b>					
Agency (Social Security, Medi-Cal, etc.)	147	331	137	123	738
Aging into Medicare Postacd - CDA HICAP	0	0	0	4	4
CDA HICAP	30	45	1	0	76
CHA	1	0	0	0	1
CMS/Medicare	2	7	1	6	16
Friend/Relative	29	185	30	37	281
InfoVan	1	1	0	0	2
Internet	0	0	0	0	0
Mailings	0	0	0	1	1
Media	7	35	5	6	53
Other	24	331	48	31	434
Presentations	19	65	8	7	99
Previous Contacts	0	0	65	87	152
State Website	0	0	0	0	0
Missing/Not Collected	29	138	10	15	192
<b>Mode of Client Contact</b>					
Quick Call Contacts	751	1,581	751	676	3,759
Contacts by Telephone	85	150	108	152	495
Contacts In Person at home	2	24	8	5	39
Contacts In Person at site	274	1,046	258	256	1,834
Contacts by E-Mail	9	24	3	1	37
Contacts by Mail/Fax	0	0	9	11	20
Total Number of Client Contacts:	1,121	2,825	1,137	1,101	6,184
<b>Contact Status Types</b>					
General info	0	0	94	167	261
Detailed Assistance	0	0	124	161	285
Problem Solving/Resolution	0	1	79	89	169
<b>Total Counseling Time Spent by Counselor Type</b>					
Program Manager	22.00	104.35	28.30	21.40	176.05
Volunteer	67.35	515.59	88.45	101.50	772.89
Paid	252.48	726.07	206.28	215.37	1,400.20
In-Kind	5.30	65.50	0.45	4.30	75.55
<b>SECTION 2 - Client Demographics</b>					
<b>Ethnicity</b>					
(Hispanic/Latino)	11	15	6	5	37
<b>Race</b>					
African American/Black	0	5	1	0	6

From: 07/01/2010 To: 06/30/2011

## Client Contacts & Demographics

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
American Indian/Alaskan Native	0	12	3	6	21
Caucasian/White	212	772	202	215	1,401
Native Hawaiian	0	0	2	1	3
Guamanian or Chamoro	0	0	0	0	0
Samoan	0	0	0	0	0
Asian Indian	0	0	0	0	0
Chinese	0	1	0	0	1
Filipino	1	3	0	1	5
Japanese	1	0	0	0	1
Hmong	0	0	0	0	0
Korean	0	0	0	0	0
Vietnamese	6	13	1	1	21
Other Pacific Islander	0	0	0	0	0
Other Asian	0	2	1	1	4
Two or More Race	1	0	0	0	1
Some Other race	6	8	3	3	20
Not Collected	62	322	92	89	565
<b>Gender</b>					
Female	170	682	165	180	1,197
Male	111	383	122	118	734
Not Collected	8	73	18	19	118
<b>Monthly Income</b>					
Less than 150% of FPL	66	150	51	64	331
Equal To/Greater than 150% of FPL	92	326	79	79	576
Not collected	131	662	175	174	1,142
<b>Client Asset Limits</b>					
Below LIS Asset limit	0	0	44	26	70
At or Above LIS Asset Limit	0	0	8	12	20
Not Collected	289	1,138	253	279	1,959

From: 07/01/2010 To: 06/30/2011

## Client Contacts & Demographics

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
<b>Total Clients that Checked Yes as Being</b>					
Veteran	29	87	30	23	<b>169</b>
Limited English Proficient (LEP)	1	6	2	3	<b>12</b>
Dual Eligible	74	227	79	82	<b>462</b>
Medicare Status Due to Disability	74	182	79	69	<b>404</b>
Dual Eligible due to Mental Disability	0	0	11	14	<b>25</b>
Applying/Receiving Social Security/Medicare Disability	0	0	70	61	<b>131</b>
<b>Age</b>					
Under 60	45	113	61	34	<b>253</b>
60-64	25	46	22	50	<b>143</b>
65-74	115	473	132	127	<b>847</b>
75-84	58	311	55	52	<b>476</b>
85+	20	114	25	26	<b>185</b>
Not Collected	26	81	10	28	<b>145</b>
<b>Marital Status</b>					
Married	119	462	111	101	<b>793</b>
Never Married	17	32	8	18	<b>75</b>
Separated	3	9	5	2	<b>19</b>
Divorced	40	121	42	46	<b>249</b>
Widowed	50	204	46	55	<b>355</b>
Domestic Partner	2	2	1	5	<b>10</b>
Not Collected	58	308	92	90	<b>548</b>
<b>Estimated Financial Saving</b>					
Clients with Financial Savings	33	206	41	47	<b>327</b>
Estimated Dollars Saved	\$52,808.80	\$122,273.90	\$39,449.56	\$44,738.10	<b>\$259,270.36</b>

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From: 07/01/2010 To: 06/30/2011

	Topics/Needs Discussed				
	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	
	Q1	Q2	Q3	Q4	TOTAL
Medicare Parts A&B (Original Medicare)					
Enrollment/Eligibility/Screening	115	226	123	230	694
Benefit Comparisons/Explanation/Coverge Changes	78	128	113	144	463
Appeals/Grievances	5	6	3	7	21
Billings/Claims	23	20	24	31	98
Fraud/Abuse	0	0	0	1	1
Quality of Care	0	0	0	0	0
LTC/LTCI					
Enrollment/Eligibility Assistance	8	7	5	1	21
Billings/Claims	2	0	1	0	3
LTC Partnership	0	0	0	0	0
Appeal/Greivances	0	0	0	0	0
Fraud/Abuse	0	0	0	0	0
Other LTC	0	0	2	3	5
Medigap/Supplement/SELECT					
Enrollment/Eligibility/Screening	108	218	96	139	561
Benefit Explanation	90	179	90	125	484
Appeals/Grievances	0	3	1	0	4
Billings/Claims	7	9	9	19	44
Fraud/Abuse	0	0	0	1	1
Disenrollment/Coverage Changes	4	11	4	6	25
Quality of Care	0	0	0	0	0
Plan Comparison	0	0	40	73	113
Marketing/Sales Complaints/Issues	0	0	0	0	0
Plan Non Renewal	0	0	1	0	1
Medicare Advantage (e.g., MSA, HMO, PPO, Specialty Plans)					
Eligibility/Screening	84	151	61	87	383
Benefit Explanation	75	146	75	96	392
Appeals/Grievances	0	1	2	0	3
Billings/Claims	9	9	4	7	29
Fraud/Abuse	0	1	0	1	2
Coverage Changes/Disenrollment	6	12	11	10	39
Plan Non Renewal	2	3	4	0	9
Plan Comparison	0	0	27	56	83
Enrollment/Enrollment Asistance	0	0	2	1	3
Quality of Care	0	0	0	0	0
Marketing/Sales Complaints or Issues	0	0	1	2	3
Medi-Cal					
Medi-Cal Screening (SSI, Nursing Home)	12	9	36	32	89
Medi-Cal Application Assistance	0	0	0	1	1



From: 07/01/2010 To: 06/30/2011

	Topics/Needs Discussed				TOTAL
	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	
MSP Screening (QMB, SLMB, Q-1)	20	29	71	169	289
MSP Application Assistance	0	0	6	8	14
Medi-Cal/QMB Claims	0	0	4	7	11
Fraud/Abuse	1	1	0	0	2
Other	120	240	34	19	413
<b>Other</b>					
Employer/Federal Health Benefits (FEHB)	29	28	29	45	131
Military Benefits	14	31	12	13	70
COBRA	8	6	0	2	16
Mental Health Topics	21	31	18	12	82
Fraud/Abuse	0	0	0	1	1
Other Health Insurance	0	0	5	6	11
Other	2	8	3	7	20
<b>Part D - Medicare Prescription Drug Coverage</b>					
Benefit Explanation	0	0	196	219	415
Eligibility/Screening	187	1,026	184	209	1,606
Plan Comparison	162	1,001	151	147	1,461
Enrollment/Anrollment Assistance	84	597	81	66	828
Billings/Claims	8	2	4	10	24
Coverage Changes	7	78	19	14	118
Re-enrollment	4	3	4	0	11
Disenrollment	1	2	4	3	10
TROOP	0	1	2	1	4
Other	35	68	15	11	129
<b>LIS / Extra Help</b>					
Eligibility / Screening	72	233	127	178	610
Benefit Explanation	0	0	80	99	179
Application Assistance	21	48	30	21	120
Claims/Billings	0	0	3	2	5
Appeals / Grievances	1	0	1	0	2
<b>Other Prescription Drug CoveragePlans</b>					
Union/employer	18	20	18	26	82
PPARx	4	2	3	10	19
Military Drug Benefit	0	0	9	10	19
Manufacturer Program	4	1	2	0	7
Other	5	11	6	5	27
<b>Part D Plan Problems</b>					
<b>(Non-Compliance Services Unmet)</b>					
Eligibility	8	12	13	8	41
Lag Time	0	1	2	0	3
Multiple Enrollment	2	3	2	2	9
Poor Training of Agents	1	1	2	0	4
Poor Training of CSR	1	0	3	1	5

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	Topics/Needs Discussed				TOTAL
	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	
Fraud/Abuse	0	0	0	0	0
Marketing Fraud/Abuse	0	0	0	0	0
Agent fraud/abuse	0	0	0	0	0
Formulary problems/changes	12	9	10	8	39
Dosage problem	1	1	0	2	4
Data problems	4	1	3	2	10
Delay in medications	1	1	1	0	3
Incorrect Co-Pay/Can't Afford Co-Pay	1	0	5	0	6
Client reached donut hole	3	3	0	3	9
SSA Premium withheld	0	0	3	1	4
Appeals/Grievances	0	0	1	1	2
Quality of Care	0	0	0	0	0
Plan Non Renewal	0	0	5	2	7
<b>HICAP Legal Services</b>					
Referrals to HICAP Legal	0	0	0	0	0
Legal Clients Served	0	0	3	0	3
Cases Opened	0	0	0	0	0
Cases Closed	0	0	3	0	3
Favorable Closed Case Results	0	0	0	0	0
Client Representation Hours	0	0	0	0	0
Consultation to Program Hours	0	0	9	0	9
HICAP Legal Clients that Saved	0	0	0	0	0
Estimated Financial Savings	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

**Health Insurance Counseling and Advocacy (HICAP) Aggregate Report****Program: PSA 2 - HICAP Services of Northern California**

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**Complaints Filed**

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	
	Q1	Q2	Q3	Q4	TOTAL
<b>Medicare Part D Complaints Filed</b>					
CDI:	0	0	0	0	<b>0</b>
CMS:	1	0	1	1	<b>3</b>
Part D Plan:	1	0	4	2	<b>7</b>
SMP:	0	0	0	0	<b>0</b>
Urgent Fax:	0	0	0	0	<b>0</b>
800 Medicare:	3	0	6	1	<b>10</b>
Other:	27	51	19	10	<b>107</b>
<b>TOTAL MEDICARE PART D COMPLAINTS</b>	<b>32</b>	<b>51</b>	<b>30</b>	<b>14</b>	<b>127</b>

**All Other Complaints**

APS :	0	0	0	0	<b>0</b>
CDI:	0	0	0	0	<b>0</b>
CMS:	0	0	1	2	<b>3</b>
QIO:	0	0	0	0	<b>0</b>
SMP:	0	0	0	0	<b>0</b>
Other:	0	0	1	1	<b>2</b>
<b>TOTAL ALL OTHER COMPLAINTS</b>	<b>0</b>	<b>0</b>	<b>2</b>	<b>3</b>	<b>5</b>

**800 Medicare Line Issues**

<b>Total number of Calls with Issues</b>	<b>38</b>	<b>33</b>	<b>43</b>	<b>39</b>	<b>153</b>
<b>Total duration of calls</b>	<b>8.22</b>	<b>4.41</b>	<b>7.41</b>	<b>-5.01</b>	<b>15.03</b>